

## User Access & Certification

### Project and Program Certification

#### What is User Access & Certification?

The User Access and Certification web based application is a tool to facilitate annual recertification for ePM. The tool allows all ePM Users to certify themselves. In addition, user's access to programs and projects must also be recertified annually. Users with specific security rights known as Project or Program Certifiers will complete project and program recertification. The Certifiers will verify if users assigned to their programs or projects still require access and if those users have appropriate security roles assigned. While working with program or project recertification, there is the opportunity to:

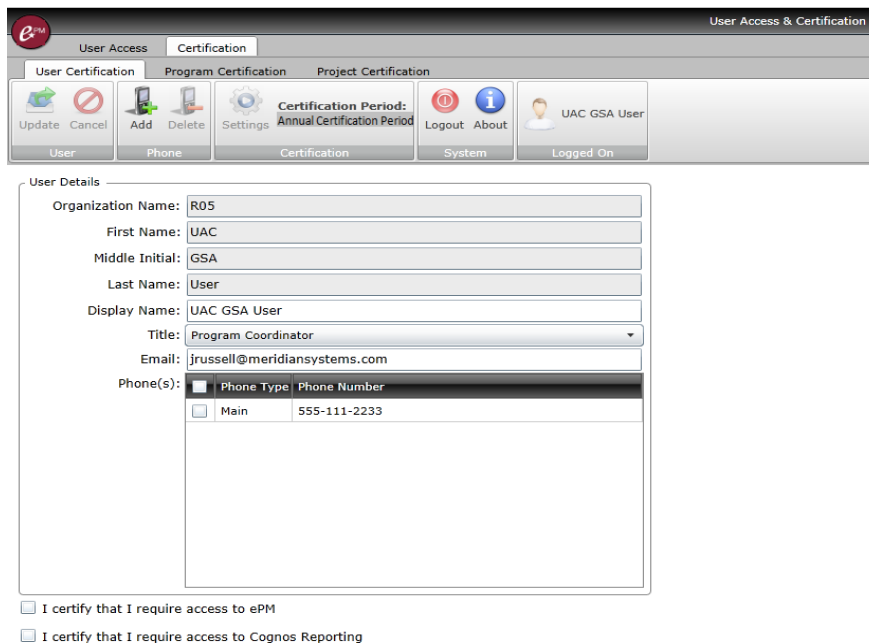
- Review the list of users in the program or project
- Remove users that no longer require access to the program or project
- Review the security category which grants users rights to various documents and activities
- Adjust security categories for users if required

#### Who Will Use This?

- ✓ GSA Project Certifiers
- ✓ GSA Program Certifiers

## Project & Program Certifier (User)

1. Launch the User Access & Certification application from the ePM Portal
2. Verify user information. The information displayed is from the contact page in ePM.



**User Details**

Organization Name: R05

First Name: UAC

Middle Initial: GSA

Last Name: User

Display Name: UAC GSA User

Title: Program Coordinator

Email: jrussell@meridiansystems.com

Phone(s):

Phone Type	Phone Number
Main	555-111-2233

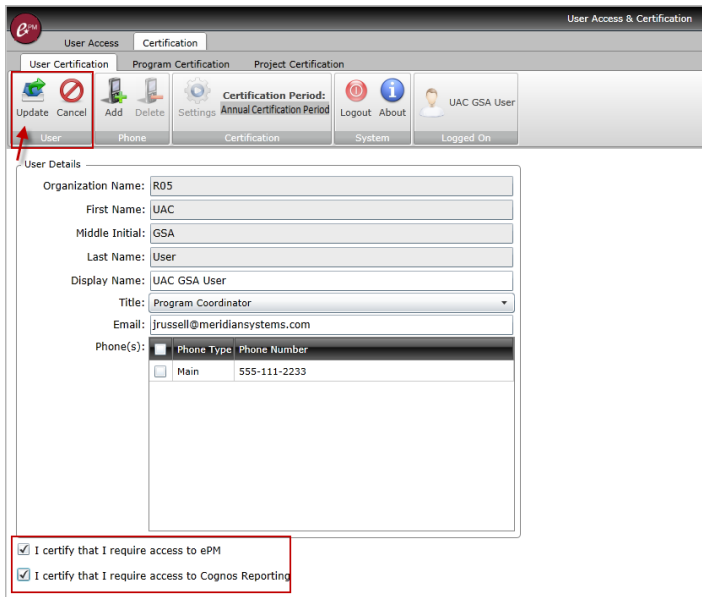
☐ I certify that I require access to ePM

☐ I certify that I require access to Cognos Reporting

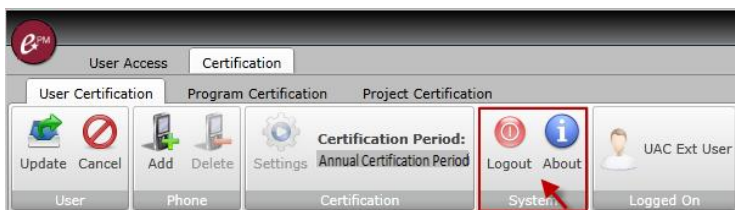
- The following fields are Read Only:
    - Organization Name
    - First Name
    - Middle Name
    - Last Name
  - If any of the information above is incorrect, please contact the local ePM System Administrator.
  - The following fields can be updated if necessary:
    - Display Name
    - Title (select from the dropdown list)
    - Email address
    - Telephone Number (to add or remove a telephone number use the icons in the top tool bar)er), cont.
3. If access to ePM is required, Click in the box in front of “I certify that I require access to ePM”

If Cognos Reporting access is required, put a check in the box in front of “*I certify that I require access to Cognos Reporting*”

All External (non-GSA) ePM Users must Read and Acknowledge the Rules of Behavior, put a check in the box in front of “*I acknowledge and agree to abide by the ePM Rules of Behavior.*”

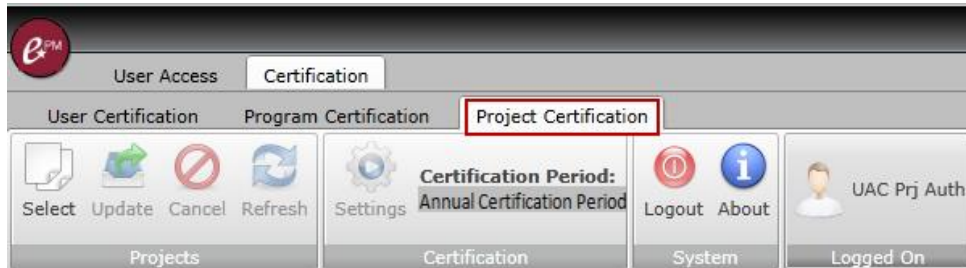


- When complete click on the Logout icon in the top tool bar.



## Project & Program Certifier (Authority)

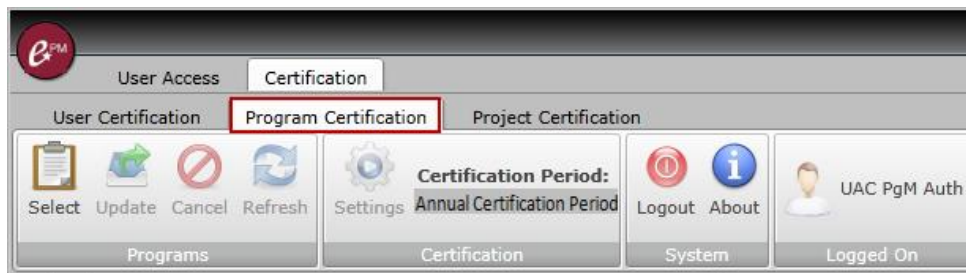
1. If user is the Project Certifier Authority, in the top tool bar, select Project Certification Tab.



And a pop-up window with the projects to be certified will open


Project Certification		
Count = 9 Page 1 of 1		
Project Number	Project Title	Program Title
<input type="checkbox"/> 3229	NM-Santa Teresa-Santa Teresa LPOE-ARRA Santa Teresa LPOE Renova	Region 07 - Greater Southwest Region Cap
<input type="checkbox"/> 363	TX-Austin-New Austin CT-New Construction	Region 07 - Greater Southwest Region Cap
<input type="checkbox"/> 5191	TX-Laredo-Convent Avenue LPOE-Modernization Renovation	Region 07 - Greater Southwest Region Cap
<input type="checkbox"/> 5531	TX-Laredo-New Vehicle Processing Inspection Facility	Region 07 - Greater Southwest Region Cap
<input type="checkbox"/> 3533	TX-San Antonio-New San Antonio CT -New CT	Region 07 - Greater Southwest Region Cap
<input type="checkbox"/> 630	TX-Tornillo-Tornillo (Fabens) Guadalupe LPOE-New LPOE	Region 07 - Greater Southwest Region Cap
<input type="checkbox"/> 18841	TX-DALLAS-EMPIRE CENTRAL BLDG-DSLA13-03 DHS-CIS Phase IV - 7	Region 07 - Greater Southwest Region Sm
<input type="checkbox"/> 18845	TX-DALLAS-TERMINAL ANNEX FEDERAL BLDG-MEPS Dutch Door Proj	Region 07 - Greater Southwest Region Sm
<input type="checkbox"/> 5214	AZ-Ajo-BS Resident-CBP Housing	Region 09 - Pacific Rim Region Capital Proj

If user is the Program Certifier Authority, select the Program Certification Tab.




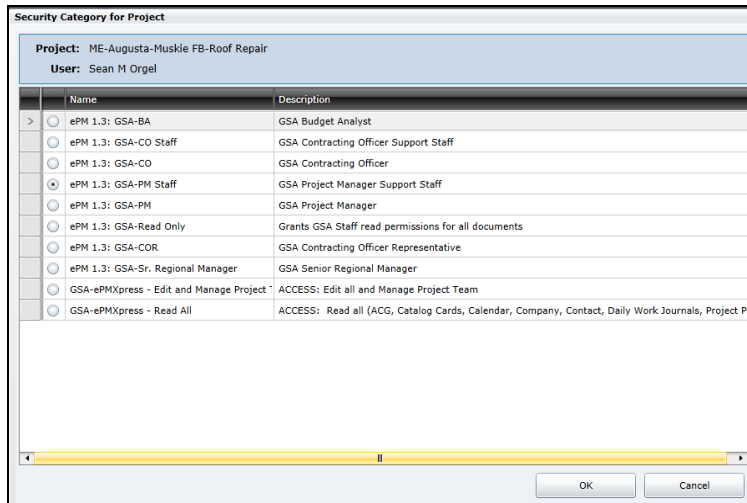
And a pop-up window with the programs to be certified will open

Program Certification		
Count = 3 Page 1 of 1		
Program Number	Program Title	
<input type="checkbox"/> R0001Capital	Region 01 - New England Region Capital Project Program	
<input type="checkbox"/> R0007Capital	Region 07 - Greater Southwest Region Capital Project Program	
<input type="checkbox"/> R0007Small	Region 07 - Greater Southwest Region Small Project Program	

- From within either the Project or Program tab, double-left click on the column heading to Sort by that column
  - Use the  icon to filter for a Project Number, Project Title, or Program Title. Place a check in the box in front of the Project or Program to be included for certification within this specific Certification Period process.
- Users will be displayed by Company and Contact. Click in the Certify or Remove checkbox for each user. Or, click in the the Certify All or Remove All checkboxes on the top of each column.

User Access & Certification						
User Access		Certification				
User Certification		Program Certification		Project Certification		
Select	Update	Cancel	Refresh	Settings	Certification Period: Annual Certification Period	Logout About
Projects		Certification		System		
				Logged On		
Organization Name	Contact Name	Email	Project Access	Certify	Remove	
3229: NM-Santa Teresa-Santa Teresa LPOE-ARRA Santa Teresa LPOE Renovation						
AECOM Services Group	Aaron R. Bowes	aaron.bowes@aecom.com	ePM 1.3: EXT-AE Staff	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
DHS-CBP	Jason S Smith	jason.s.smith@dhs.gov	ePM 1.3: EXT-Read Only	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Jacobs	Damien G Pulido	damien.pulido@jacobs.com	CC ePM 1.3: EXT-CMa (Read Own) (3.0)	<input type="checkbox"/>	<input type="checkbox"/>	
Jacobs	Jennifer Leigh Hetherington	jennifer.hetherington@gsa.gov	CC ePM 1.3: EXT-CMa (Read Own) (3.0)	<input type="checkbox"/>	<input type="checkbox"/>	

- To change a user's Security Category click on the  icon within the the Project Access or Program Access column. A listing of the available Security Categories will be displayed. Select a security category Name and click OK.




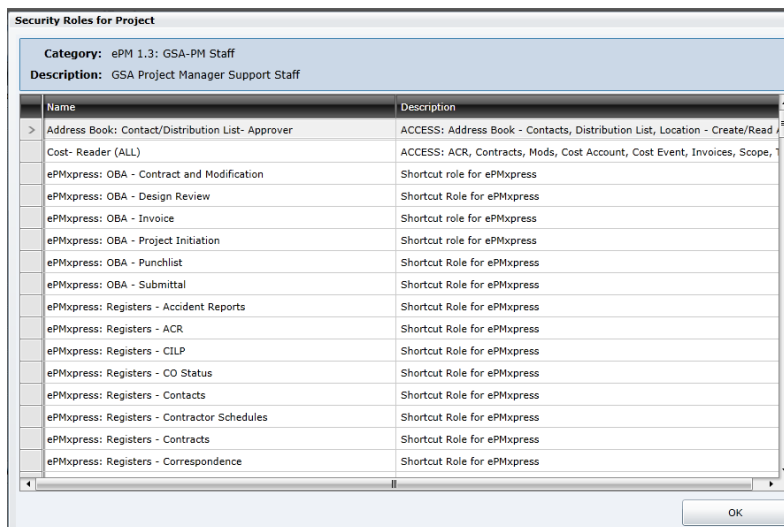
**Security Category for Project**

**Project:** ME-Augusta-Muskie FB-Roof Repair  
**User:** Sean M Orgel

Name	Description
ePM 1.3: GSA-BA	GSA Budget Analyst
ePM 1.3: GSA-CO Staff	GSA Contracting Officer Support Staff
ePM 1.3: GSA-CO	GSA Contracting Officer
ePM 1.3: GSA-PM Staff	GSA Project Manager Support Staff
ePM 1.3: GSA-PM	GSA Project Manager
ePM 1.3: GSA-Read Only	Grants GSA Staff read permissions for all documents
ePM 1.3: GSA-COR	GSA Contracting Officer Representative
ePM 1.3: GSA-Sr. Regional Manager	GSA Senior Regional Manager
GSA-ePMXpress - Edit and Manage Project	ACCESS: Edit all and Manage Project Team
GSA-ePMXpress - Read All	ACCESS: Read all (ACG, Catalog Cards, Calendar, Company, Contact, Daily Work Journals, Project P

OK Cancel

- To review a list of Security Roles within a Security Category select the  icon to the right of the Security Category icon. For more information on Security Categories and Roles contact the local ePM System Administrator.



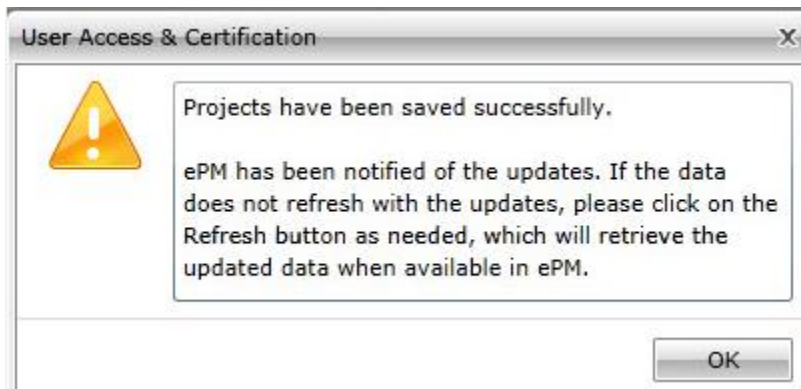
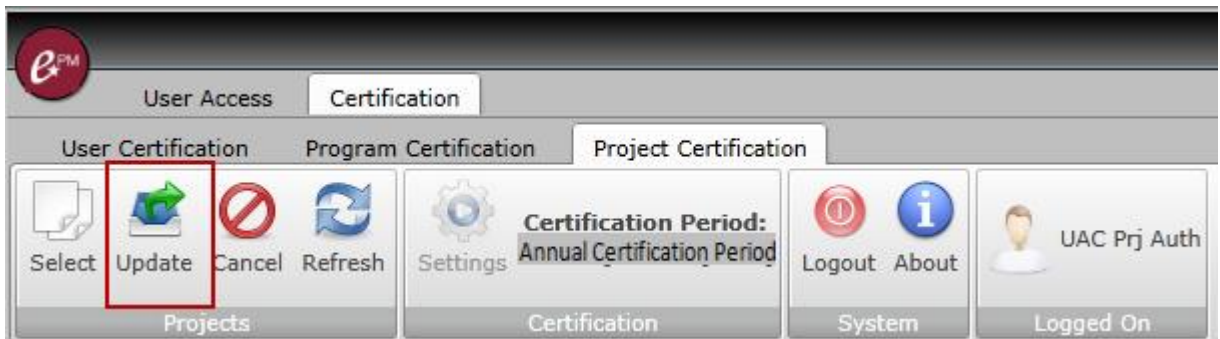
**Security Roles for Project**

**Category:** ePM 1.3: GSA-PM Staff  
**Description:** GSA Project Manager Support Staff

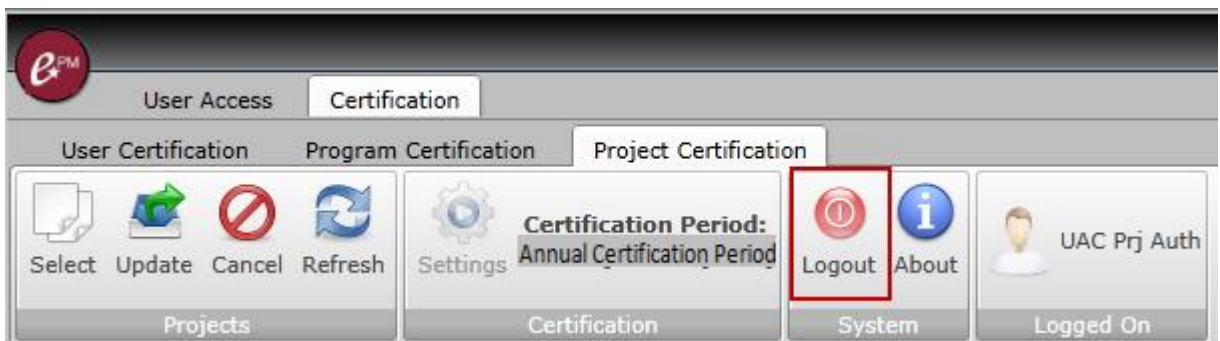
Name	Description
Address Book: Contact/Distribution List- Approver	ACCESS: Address Book - Contacts, Distribution List, Location - Create/Read
Cost- Reader (ALL)	ACCESS: ACR, Contracts, Mods, Cost Account, Cost Event, Invoices, Scope, T
ePMXpress: OBA - Contract and Modification	Shortcut role for ePMXpress
ePMXpress: OBA - Design Review	Shortcut Role for ePMXpress
ePMXpress: OBA - Invoice	Shortcut role for ePMXpress
ePMXpress: OBA - Project Initiation	Shortcut role for ePMXpress
ePMXpress: OBA - Punchlist	Shortcut Role for ePMXpress
ePMXpress: OBA - Submittal	Shortcut Role for ePMXpress
ePMXpress: Registers - Accident Reports	Shortcut Role for ePMXpress
ePMXpress: Registers - ACR	Shortcut Role for ePMXpress
ePMXpress: Registers - CILP	Shortcut Role for ePMXpress
ePMXpress: Registers - CO Status	Shortcut Role for ePMXpress
ePMXpress: Registers - Contacts	Shortcut Role for ePMXpress
ePMXpress: Registers - Contractor Schedules	Shortcut Role for ePMXpress
ePMXpress: Registers - Contracts	Shortcut Role for ePMXpress
ePMXpress: Registers - Correspondence	Shortcut Role for ePMXpress

OK

5. To save click Update in the top tool bar.



6. When complete click Logout in the top tool bar.



## Tips

1. Internet Explorer version 9 (or higher) is the recommended web browser
2. Verify personal email address is correct in ePM so that so that delivery of the certification notices regarding the recertification process is not affected.
3. Certify before the end date as documented in the email notification. ePM Notifications will be sent to users when action is necessary for certification. However, the web application can be accessed at any time to update Name, email, or Phone numbers.
4. If certification is NOT completed by the Certification End date, the user account will be locked. Please contact the local ePM System Administrator
5. If certification is NOT completed by the Grace Period End Date, user will loose license to use ePM. Please contact the local ePM System Administrator for assistance.
6. When changing Security Categories, if the data does not refresh with the updates after saving, please click the refresh button.
7. If a Program or Project Manager does not certify a user before the Certification ends the user access will be removed.
8. If a user re-certifies and the Project Manager does NOT re-certify the user to have project access, the user will no longer have project access.

Questions/issues please contact [epmsupport@gsa.gov](mailto:epmsupport@gsa.gov)